**Prosperity Connection**

**External Committee Notes**

*May 15, 2025*

*11:00 a.m. – noon (CST)*

*Zoom*

*Agenda*

1. Call to Order – Attendance: Nikki Whetsell, Carol Harris, and Will Holleman

**See External Committee portal for detailed presentation**

1. Marketing and Communications
   1. Outreach numbers increased probably due to the client celebration posts.
   2. Newsletter opens and clicks for both April and May were down a little bit. MailChimp was suggesting a later send time, which may affect. Overall percentages are still very good.
   3. LinkedIn is driving more outreach and will continue to focus on. Will has a lot of good suggestions and happy to share and help drive more engagement.
   4. Outcomes – great class pull through rate and coaching sessions are on track, credit report reviews are down, but a meeting on deck to work on alliance members to participate.
   5. New intern, Rome, on board to help with more social media presence.
2. Recent Gifts/Contracts – See slide deck –
   1. Please see the slide deck for the entire list.
   2. Highlights – Board and Committee Client Celebration sponsorship,
   3. Research/Applications
      1. Marrillac Mission Fund
      2. Ameriprise
      3. Centene Foundation
      4. Light a Single Candle

\*Will has contacts with Tracey Family (sister married to family), also will find a contact at Dot Foods. Will has been working closely with Ben on some of his other contacts as well.

* 1. UPDATES
     1. Give STL Day – want to stay connected and participate. It is not a big push for us. We did raise $2900, despite no large push. Planning next year to do a PC Day of giving after the Client Celebration.
     2. Will loved the venue. Asked about an auction, but for now, we hope to keep it just about the clients for now.
     3. Outreach meetings last week with, St. Louis Community College, Stifel Bank and Trust, MSLCRA Association.
     4. Client Celebration was amazing! RGA and US Bank were very impressed and happy with the event.
  2. What We Need Your Help With
     1. Continue to sign up for training – classes, credit report reviews
     2. Help making connections
     3. Who should we be following? Will would love to meet with the social media intern. Will works with a young person for social media. Let’s connect the two of them!
  3. Adjourn @11:32 a.m.